

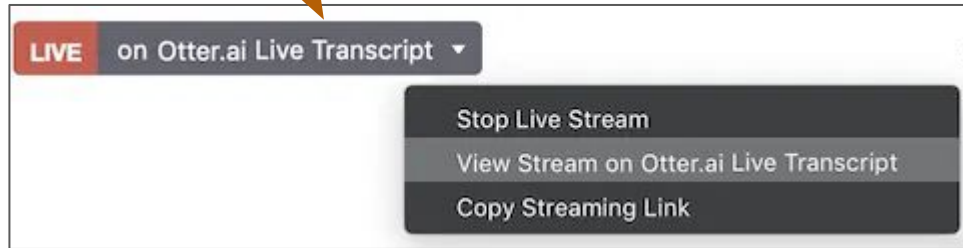
# Introduction to EAC-CPF 2.0

2021-04-27 and 2021-04-29

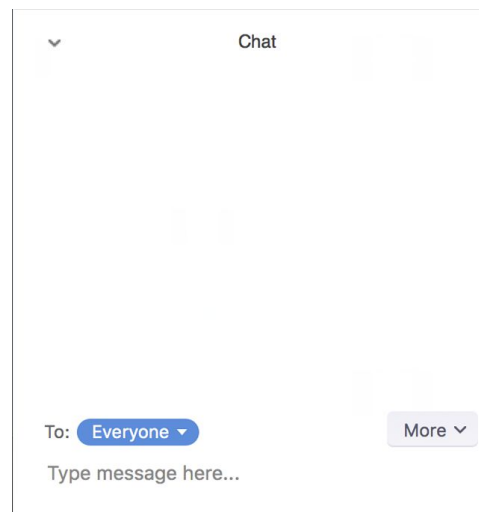
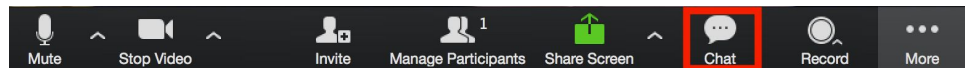
All lines are muted. If you cannot hear audio once the webinar starts, please call in via phone

Call-in numbers: <https://zoom.us/join>  
Meeting ID: 999 7280 7967

# View **live transcript** on Otter.ai



# All lines are **muted**



## Use **chat** for questions

# Introduction to EAC-CPF 2.0

2021-04-27 and 2021-04-29

## Presenters

Ailie Smith, University of Melbourne, Australia


Karin Bredenberg, Kommunalförbundet Sydarkivera, Sweden

Kerstin Arnold, Archives Portal Europe Foundation, Europe

Silke Jagodzinski, Geheimes Staatsarchiv Preußischer Kulturbesitz Berlin, Germany

# TS-EAS

- Technical Subcommittee on Encoded Archival Standards at the Society of American Archivists (SAA)
- Background and work covered in this presentation:
  - <https://youtu.be/9NXNyx9py-I>



We take care of the  
formats you use to  
manage and share  
archival information

We need your  
comments,  
suggestions and  
bug reports

Your input  
drives our  
work forward

# Where you can find more

TS EAS

<https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas>



TS-EAS on GitHub

<https://github.com/SAA-SDT>



EAD publication

<http://www.loc.gov/ead/index.html>



EAC publication

<https://eac.staatsbibliothek-berlin.de/>



Our mailing list

[EAD@LISTSERV.LOC.GOV](mailto:EAD@LISTSERV.LOC.GOV)

Reporting an issue via SAA

<https://www2.archivists.org/standards/TS-EAS-report-an-issue>



# Standards revision

Annual rolling revision cycle for minor releases

(see more on GitHub:

<https://github.com/SAA-SDT/TS-EAS-subteam-notes/blob/master/rolling-revision-cycle.md>)

Evaluate standards for potential major revision every five years following guidelines by SAA's Standards Committee

(see more:

<https://www2.archivists.org/governance/handbook/section7/groups/Standards/Development-and-Review> )

**Some words to start with ...**



# Presenters

**Ailie Smith**, Digital Curator and  
Archives Specialist, University of  
Melbourne, Australia

**Kerstin Arnold**, APEF Manager,  
Archives Portal Europe Foundation,  
Europe

**Silke Jagodzinski**, Head of Digital  
Service and IT unit, Geheimes  
Staatsarchiv Preußischer  
Kulturbesitz, Berlin, Germany

# Revision steps

## **EAC-CPF 2010**

revision started in 2017

interim result:

## **EAC-CPF 2010 version 2018**

major revision:

## **EAC-CPF 2.0 draft**

# Revision targets

**simplifying** where possible,

**aligning with EAD** where useful,

implementing **features and solutions** upon users' request,

**clearing up** unused components

# Call for comments

drafts:

**schema** files (xsd, rng)

**schematron**

**conversion** stylesheet

**Tag Library** without examples

**revision** notes

**questionnaire**

## <EAC-CPF>

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## CALL FOR COMMENTS: REVISION OF ENCODED ARCHIVAL CONTEXT – CORPORATE BODIES, PERSONS, FAMILIES

The [Technical Subcommittee on Encoded Archival Standards](#) is pleased to release Encoded Archival Context – Corporate bodies, Persons, Families (EAC-CPF) 2.0, a draft updated version of the standard for public review and comment. To ensure the greatest possible input from EAC-CPF users around the world, the subcommittee is calling for comments on the proposed changes to the current version, EAC-CPF 2010. **The deadline for comments on the change proposals is June 30, 2021.**

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- simplifying where possible,
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- March 2021: Call for comments
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10. December 2019 - 11:42

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10. December 2018 - 7:00

# **Simplified schema and alignment between both EAS**

# Design principles

- In general: newly established [TS-EAS Design principles](#)
  - E.g. sequence of elements  
(required before optional, not repeatable before repeatable)
- EAC-context: two concepts to bundle elements:
  - Plural elements, e.g.  
<functions>, <places> to group singular elements of the same kind
  - <...Set> elements, e.g.  
<dateSet> to group elements with different concepts

# Alignment objectives

- Address overlap of standards and user communities
- Easier to maintain
- Easier to teach, learn, and use
- What has the same name and scope should be defined and used in the same way



# Renamed elements

- Renamed as part of alignment
  - <abbreviation> to <shortCode>
  - <citation> to <reference>
  - <placeEntry> to <placeName>
  - <script> to <writingSystem>
- Renamed to be more precise
  - <eac-cpf> to <eac>
  - <nameEntryParallel> to <nameEntrySet>
  - <entityId> to <identityId>

# Replaced and removed elements

- Replaced
  - <sourceEntry> by <reference>
- Removed
  - <outline> with <level>
  - <objectBinWrap>

# Example nested <list>s

```
<structureOrGenealogy>
```

```
  <list>
```

```
    <head>Bach family</head>
```

```
    <list>
```

```
      <item>Johannes Bach I (1580-1626)</item>
```

```
      <list>
```

```
        <head>Marriage with Anna, geb. Schmied</head>
```

```
        <item>Christoph Bach</item>
```

```
        <list>
```

```
          <head>Marriage with Magdalena, geb. Grabler</head>
```

```
          <item>Johann Ambrosius Bach</item>
```

```
          <list>
```

```
            <head>Marriage with Elisabeth Lämmerhirt</head>
```

```
            <item>Johann Sebastian Bach</item>
```

# External namespaces

- Attributes of XML namespace replaced following EAD
  - `@xml:id` by `@id`
  - `@xml:base` by `@base`
  - `@xml:lang` by `@languageOfElement`
- Attributes of XLink namespace replaced following EAD
  - `@xlink:href` by `@href`
  - `@xlink:role` and `@xlink:title` by `@linkRole` and `@linkTitle`
- Other XLink attributes removed

# Global attributes

- Optional for all elements
  - @id
  - @target
  - @audience
- Optional for all elements with content
  - @languageOfElement
  - @scriptOfElement

**Control area**

# EAD alignment

new attributes in <control>:

**@countryEncoding,**

**@dateEncoding,**

**@languageEncoding,**

**@repositoryEncoding,**

**@scriptEncoding**

new child element:

**<representation>**

# Transformed elements

<maintenanceStatus> →

**@maintenanceStatus**

required with limited values:

cancelled, deleted,  
deletedMerged,  
deletedReplaced, deletedSplit,  
derived, new, revised

<publicationStatus> →

**@publicationStatus**

optional with limited values:

approved, inProcess, published



# Example <control>

```
<control audience="external" base="baseURI"  
  countryEncoding="iso3166-1" dateEncoding="iso8601"  
  id="control1" languageEncoding="iso639-1"  
  maintenanceStatus="new" publicationStatus="inProcess"  
  repositoryEncoding="iso15511" scriptEncoding="iso15924">
```

# Transformed elements

<eventType> →

**@maintancEventType**

required with limited values:  
cancelled, created, deleted,  
derived, revised, unknown,  
updated

<agentType> →

**@agentType**

required with limited values:  
human, machine, unknown

# Example <maintenanceEvent>

```
<maintenanceEvent maintenanceEventType="created">  
  <agent agentType="human">TS-EAS EAC-CPF team</agent>  
  <eventDateTime standardDateTime="2021-04-027T08:01:48">  
    27.04.2021</eventDateTime>  
  <eventDescription>example for webinar</eventDescription>  
</maintenanceEvent>
```

# Emphasized elements

<conventionDeclaration @id> +  
    **@conventionDeclarationReference**

<source @id> +  
    **@sourceReference**

<maintenanceEvent @id> +  
    **@maintenanceEventReference**

<localTypeDeclaration @id> +  
    **@localTypeDeclarationReference**

# Linking and referencing

# External referencing

- Referencing external vocabularies, ontologies, etc.
  - @valueURI
  - @vocabularySource
  - @vocabularySourceURI
- Referencing sources
  - <source> with <reference>
  - With an optional @href
- Referencing external resources for context
  - <reference> with other elements
  - With an optional @href

# Example (snippets)

```
<source>
```

```
  <reference href="https://catalog.archives.gov/search?q=\*&f.oldScope=descriptions  
&f.level=series&f.locationIds=53023101">Barack Obama Presidential Library</reference>
```

```
</source>
```

```
<nameEntry valueURI="Q76" vocabularySourceURI="https://www.wikidata.org/wiki/">
```

```
  <part localType="lastname">Obama</part>
```

```
  <part localType="firstname">Barack</part>
```

```
</nameEntry>
```

```
<relation>
```

```
  <targetEntity targetType="corporateBody">
```

```
    <part>Democratic Party</part>
```

```
  </targetEntity>
```

```
  <descriptiveNote>
```

```
    <p>
```

```
      <reference href="https://en.wikipedia.org/wiki/Barack\_Obama">See more</reference>
```

# Internal referencing

- Referencing from any element to any other element within the same EAC-CPF instance
  - From @target to @id
  - Option to refer to more than one element
- Referencing from descriptive elements to specific elements in <control>
  - For assertion description
  - Option to refer to more than one element



# Example (snippets)

```
<occupation>
  <term>Assistant examiner - level III</term>
  <placeName target="#place1">Bern</placeName>
</occupation>
<place id="place1">
  <placeName>Bern</placeName>
  <placeRole>Place of work</placeRole>
  <address>
    <addressLine addressLineType="street">Stauffacherstrasse 65/59g
  </addressLine>
    <addressLine addressLineType="postalCode">3003</addressLine>
    <addressLine addressLineType="country">Switzerland</addressLine>
  </address>
</place>
```

# Assertion description

# Evidence-based assertions

- Statements that form part of the EAC-CPF description
- Encoding who added an assertion when, based on which source information, and following which rules
  - @maintenanceEventReference
  - @sourceReference
  - @conventionDeclarationReference
- Especially useful in case of conflicting statements
- Option to refer to more than one element

# Example (snippets)

```
<maintenanceEvent maintenanceEventType="updated" id="me2">  
  <agent agentType="human">John Smith</agent>  
  <eventDateTime standardDateTime="2021-02-23" />  
</maintenanceEvent>
```

```
<source id="source1">  
  <reference>History of University of Oregon </reference>  
  <citedRange unit="page">270</citedRange>  
</source>
```

```
<relation sourceReference="#source1" maintenanceEventReference="#me2">  
  <targetEntity targetType="corporateBody">  
    <part>Princeton University</part>  
  </targetEntity>  
</relation>
```

# **Name encoding**

# Various names

`<nameEntryParallel>` → `<nameEntrySet>`

transformed elements:

`<authorizedForm>` → `@status: authorised`

`<alternativeForm>` → `@status: alternative`

`<preferredForm>` → `@preferredForm:  
true, false`

`@conventionDeclarationReference`

`@localType`

# Example (snippet)

```
<conventionDeclaration id="cd1">
```

```
  <reference>[...] AFNOR NF Z44-060 [...] </reference>
```

```
</conventionDeclaration>
```

```
[...]
```

```
<nameEntry preferredForm="true" status="authorized"
```

```
conventionDeclarationReference="#cd1">
```

```
  <part>Institut international des droits de l'homme</part>
```

```
</nameEntry>
```

# Example (snippet)

```
<nameEntrySet localType="parallel">
  <nameEntry languageOfElement="de" preferredForm="true"
status="authorized" localType="native">
    <part localType="surname">Arendt</part>
    <part localType="firstname">Hannah</part>
  </nameEntry>
  <nameEntry languageOfElement="ja" scriptOfElement="Jpan"
preferredForm="false" status="authorized"
localType="translation">
    <part localType="surname">アーレント</part>
    <part localType="firstname">ハナ</part>
  </nameEntry> [...]
</nameEntrySet>
```



# Place encoding

# Places vs names of places

- Encoding places in full
  - Within plural element <places>, in <relation>-s, and in the context of a <chronList>
- Encoding <placeName>-s only
  - Renamed <placeEntry> to <placeName>
  - In singular elements

# Places and their context

- <place> requires at least one of
  - Name of place (highly recommended)
  - Role of place
  - Physical address
  - Digital contact information (new)
  - Geographic coordinates (adopted from and aligned with EAD)
- <place> allows for
  - Date information
  - Informal description

# Example (snippet)

```
<place>
  <placeName countryCode="JP">Tokyo Imperial Palace </placeName>
  <placeRole>Place of birth</placeRole>
  <geographicCoordinates coordinateSystem="WGS84">N 35°40'57",
  E 139°45'07"</geographicCoordinates>
  <address>
    <addressLine addressLineType="street">1-1 Chiyoda</addressLine>
    <addressLine addressLineType="postalCode">100-8111</addressLine>
    <addressLine addressLineType="municipality">Tokyo</addressLine>
  </address>
  <contact>
    <contactLine
      contactLineType="homepage" href="https://sankan.kunaicho.go.jp/">
      Visit our website</contactLine>
    </contact>
  </place>
```

# Date encoding

# Uncertain, approximate and ongoing dates

- Statement of uncertainty
  - Adopting the attribute @certainty from EAD (along with @calendar and @era)
- Normalised uncertainty
  - Enabling the Extended Date/Time Format as integrated in ISO 8601-2:2019
- A date's status
  - New attribute @status allows indication of "unknown" or "ongoing" dates

# Example (snippets)

```
<date certainty="circa">1789</date>
```

```
<dateRange>
```

```
  <fromDate status="unknown"/>
```

```
  <toDate standardDate="0210?">c. 210</toDate>
```

```
</dateRange>
```

```
<dateSet>
```

```
  <date standardDate="2014-07">July 2014</date>
```

```
  <dateRange>
```

```
    <fromDate standardDate="2016-09">September 2016</fromDate>
```

```
    <toDate status="ongoing"/>
```

```
  </dateRange>
```

```
</dateSet>
```

# Relations



# New encoding

**<relations>**

**<functionRelation>**

**<resourceRelation>**

**<cpfRelation>**

**<relation>**

**<targetEntity>** with **@targetType**: agent,  
corporate body, person, family, resource  
function

**<relationType>**

**<targetRole>**

**<date>**, **<dateRange>**, **<dateSet>**,

**<descriptiveNote>**, **<objectXMLWrap>**, **<place>**

# Example

```
<relations>
  <relation>
    <targetEntity vocabularySource="GND"
      vocabularySourceURI="http://d-nb.info/gnd/"
      valueURI="http://d-nb.info/gnd/1190671301" targetType="person">
      <part localType="family">Arendt</part>
      <part localType="given">Paul</part>
    </targetEntity>
    <relationType>Family</relationType>
    <targetRole>parent</targetRole>
  </relation>
  [...]
</relations>
```

## <EAC-CPF>

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# WANTED

## Positions & Comments

language encoding

namespace

## Examples & Use cases

Multiple identities

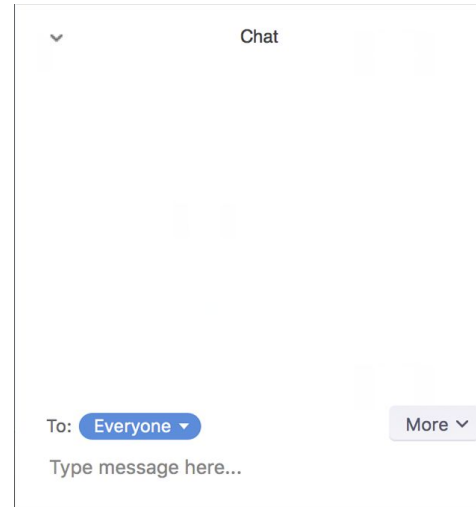
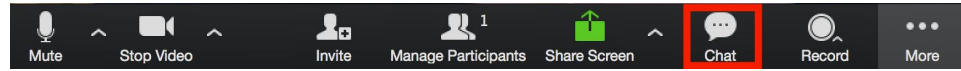
Evidence-based assertions

Alternative set

@base

@target

**Q & A**



Use **chat** for questions

# Thanks!

The recording will be available on YouTube:

<https://www.youtube.com/user/saastaff>